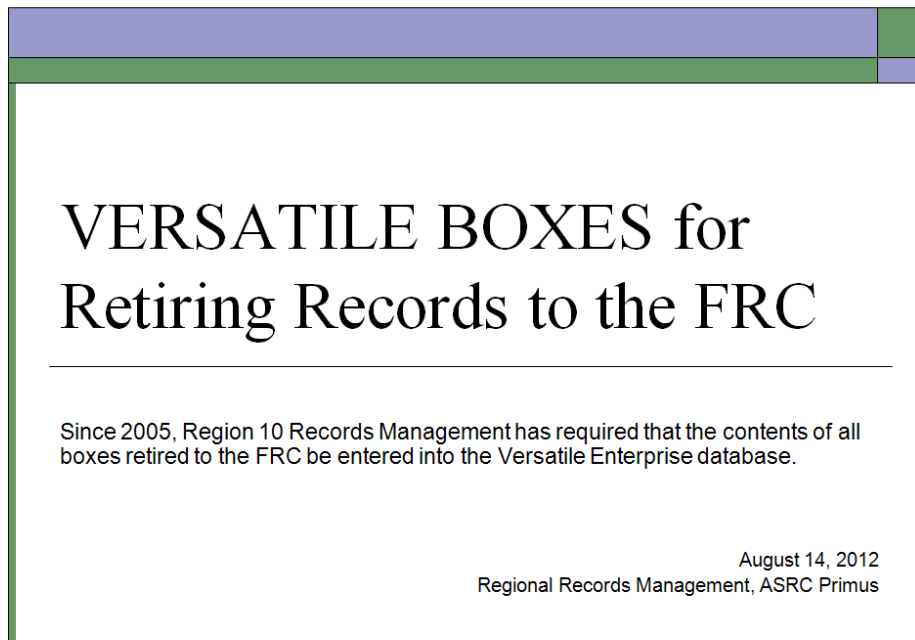


VERSATILE BOXES FOR RETIRING RECORDS TO THE FRC

Versatile Enterprise is the database software used to track active files in EPA offices, as well as inactive records stored at the Federal Records Center (FRC) facility on Sandpoint Way.



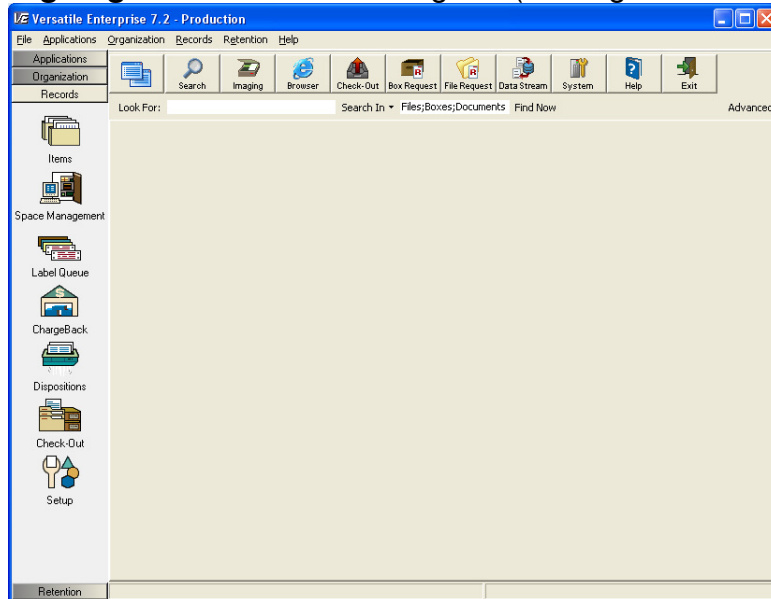
Since 2005, the Region 10 Records Management Program has required that the contents of all boxes retired to the Federal Records Center, be entered into the Versatile Enterprise Database. We needed to be able to accurately account for what the Region has at the FRC. The Versatile database gives us the ability to search by keyword to help identify boxes for FOIAs, litigation/discovery and reviews of relevant records.

Here's what we'll cover:

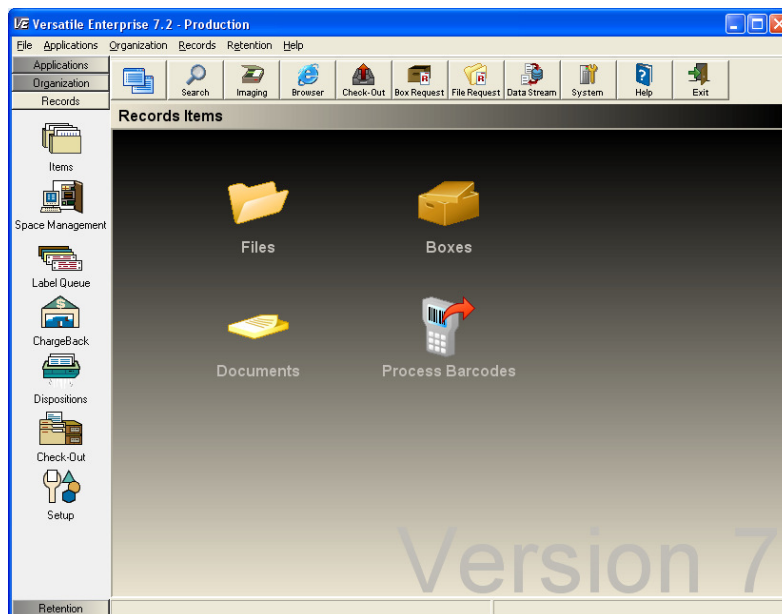
- Logging-in to Versatile and getting to the Boxes screen
- Creating Boxes in Versatile - Entering Box Information
- Adding Files to Boxes – Linking Existing Files to Boxes, from File or Box Screens
- Creating a “Place Holder” Accession Number
- Box Contents Report for your SF135
 - Box Report for FRC (abbreviated accession #, “412-2014”)
 - Box Report for FRC - full accession #
- Updating Box Information
- Final Box Report for the SF135

GENERAL VERSATILE FEATURES

Signing In – Simultaneous Sign-In (No Log-in Screen)



- **4 Side Tabs** match the drop-downs above
- **Look For:** this will search at the **Box, File and Document** levels
- Click on the **Records** side tab on the left.
- Select **Items** - you'll generally see 3 choices:
 - **Files**
 - **Boxes**
 - **Documents** – some do not have this one



- Choose **Boxes**.

Questions?

CREATING BOXES IN VERSATILE

The screenshot shows the 'VE Boxes' application window. The 'Main' tab is active, displaying several sections:

- Box Identifiers:** Includes fields for Box Number (set to 'VE'), Accession Number (412-2013-JA207A2), FRC Location (ARCIS), and Barcode ID (VE).
- Location:** Includes Box Type (FRC STANDARD BOX) and Record Center (Federal Records Center).
- Descriptive Information:** Includes Company (U.S. EPA REGION 10 - Production), State (Inactive), Department (/RM/), Record Series (-307A), and Description (Box 1 of 2, Date Range: 1/2011 - 12/2011, Records Disposition Files).
- General:** Includes Creation, Event, Submit, Misc, From (01/01/2011), To (12/31/2011), Submitted By (JADYAMA), Label Type (<None>), Disposition (S), and a checkbox for Label Printed.

On the right side of the window, there is a vertical toolbar with buttons: Search, Update, Delete, Add, Clear, Previous, Next, Itemize Files, Print Label, Options, Spell Check, and Check Out.

Auto Populated Fields:

- Box Number
- Barcode ID
- Company
- State – you can change this (**inactive/destroyed**)
- Creation
- Submit

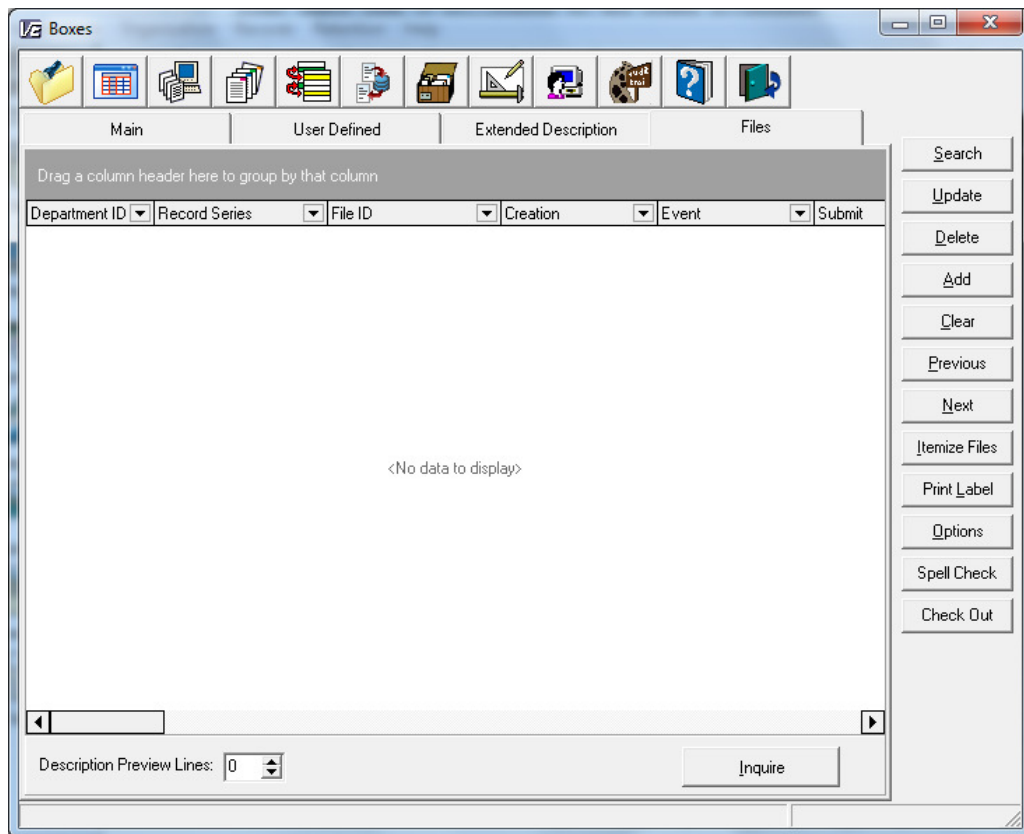
Required Fields:

- Accession Number: **412-2014-####** (Hint: input “place holder” -JA307B)
- FRC Location: enter “**ARCIS**” – FRC no longer sends us box location info
- Box Type: **FRC Standard Box** or **Map Box**
- Record Center: **Federal Records Center**
- Department: **Use “...”**
- Records Series: **Use “...”**
- Description:
 - Line 1 – **Box number in series (ex Box 1 of 2)**
 - Line 2 – **Date Range of this specific box or Closed Date**
 - Line 3 – **Further info about record group or box**
- From: **enter earliest date of documents for the entire accession**
- To: **enter latest date of documents for the entire accession**
- Submitted by: **Use “...” and choose your name**
- Disposition: **choose how to destroy or select Permanent**

ADDING/LINKING FILES TO BOXES

There are two ways to do this, at the **Box level** and at the **Files level**.

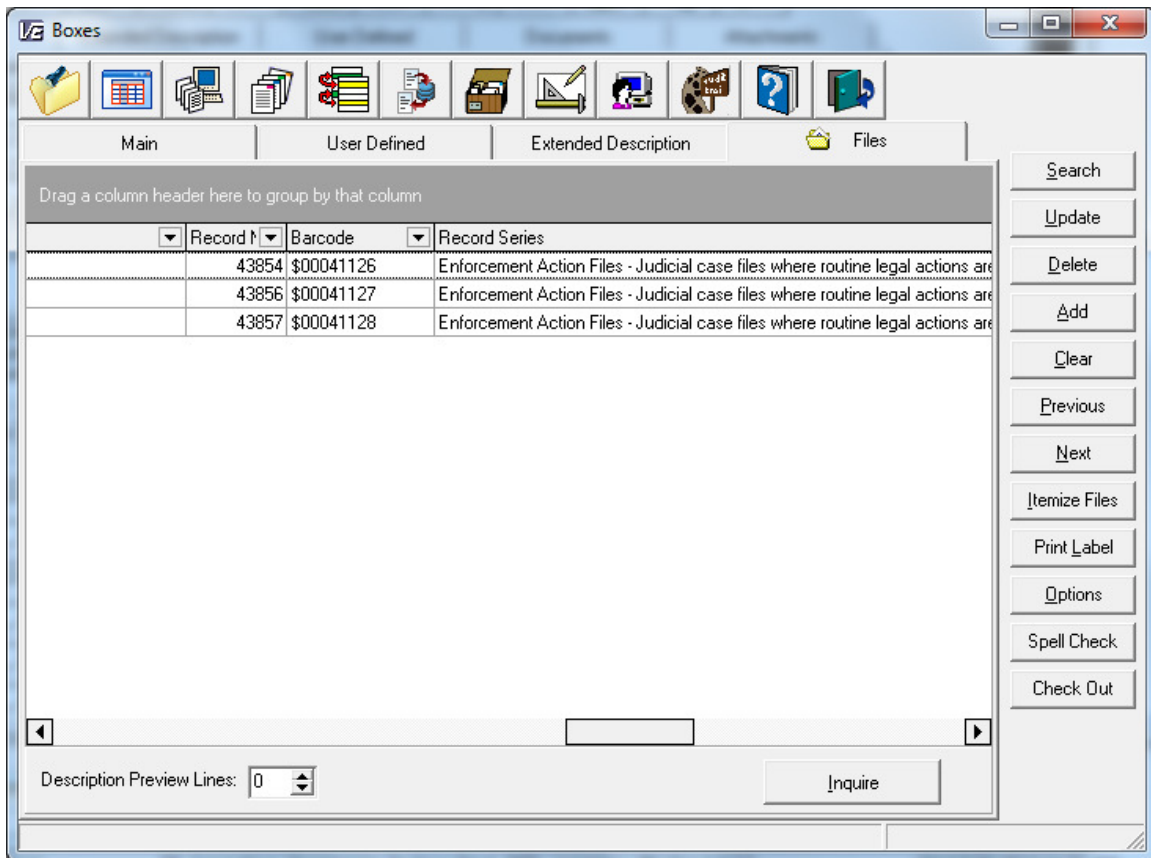
Linking Files at the Box Level – This is used when creating new boxes and putting existing Versatile files into the newly created boxes. (Easiest option and you can borrow a scanner from the Regional Records Manager.)



Adding Files to Boxes with a Scanner or Wand

- Click on the **Files** tab at the top.
- Click within the big blank box.
- Start scanning the Files' barcodes into the box.

Note: Check it every once in a while to make sure files are scanning in correctly. Every once in a while, an "invalid barcode" can halt entry.



Adding Files to Boxes Manually

- If you do not have a scanner or wand you can key in the barcode
- “~\$00089039~” You need the “~” at the beginning and end of your entry and the complete barcode number with “\$” and preceding “0’s” (you won’t see the characters as you key them in, but they will appear after a successful entry)

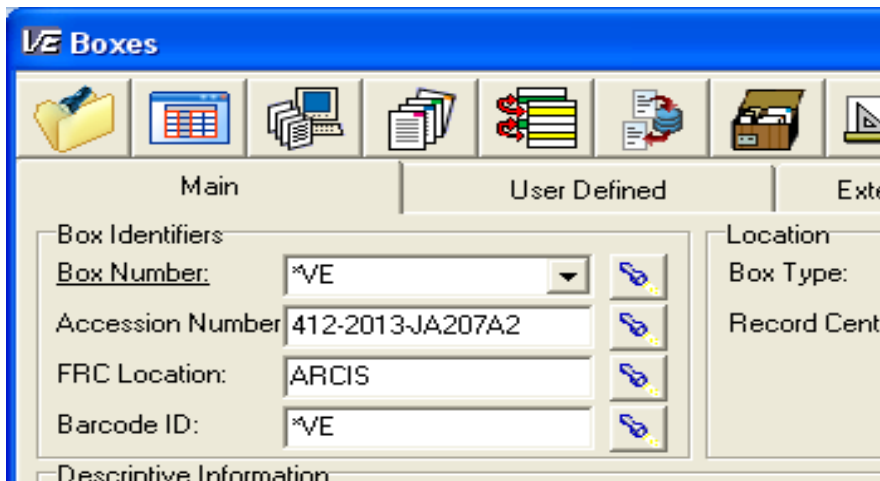
Linking Files to Boxes at the File Level – This might be the method you use when linking files to boxes that may already be at the FRC or when selecting individual files to put into boxes.

- From the Files screen, click on the **Location** tab.
- Enter the box # in the Box Information area.
- Click **Update**, the box information will populate.

CREATING A “PLACE HOLDER” ACCESSION NUMBER

One way to easily retrieve your collection of boxes is to create a “Place Holder” Accession.

- Provides a search criteria for your group of boxes
- Makes it easy to:
 - do a quick search
 - print reports
 - update box information for the accession



The screenshot shows the 'VE Boxes' application window. The 'Main' tab is active, displaying a form for box identification. The 'Box Identifiers' section contains four fields: 'Box Number' with a dropdown menu showing '*VE', 'Accession Number' with the text '412-2013-JA207A2', 'FRC Location' with the text 'ARCIS', and 'Barcode ID' with the text '*VE'. Each field has a small icon to its right. To the right of these fields is the 'Location' section, which includes 'Box Type' and 'Record Center'. At the bottom, there is a section for 'Descriptive Information'.

***VE** = Auto-generated by Versatile Enterprise Database

- Enter “**412-2014-**” (**412** represents EPA and **2013** is the fiscal year)
- Follow with a combination of:
 - Your initials
 - EPA Records Series number
 - Record Series Item number

Hint: Including the Versatile Box # (s) in the **Series Description** field of your **SF135 Form** can be helpful.

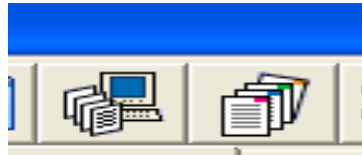
Questions?

BOX CONTENTS REPORT TO GO WITH YOUR SF135 FORM

1. Do a **Search** on your **Place Holder Accession #** or a **Box #** and press the **Look Up** button



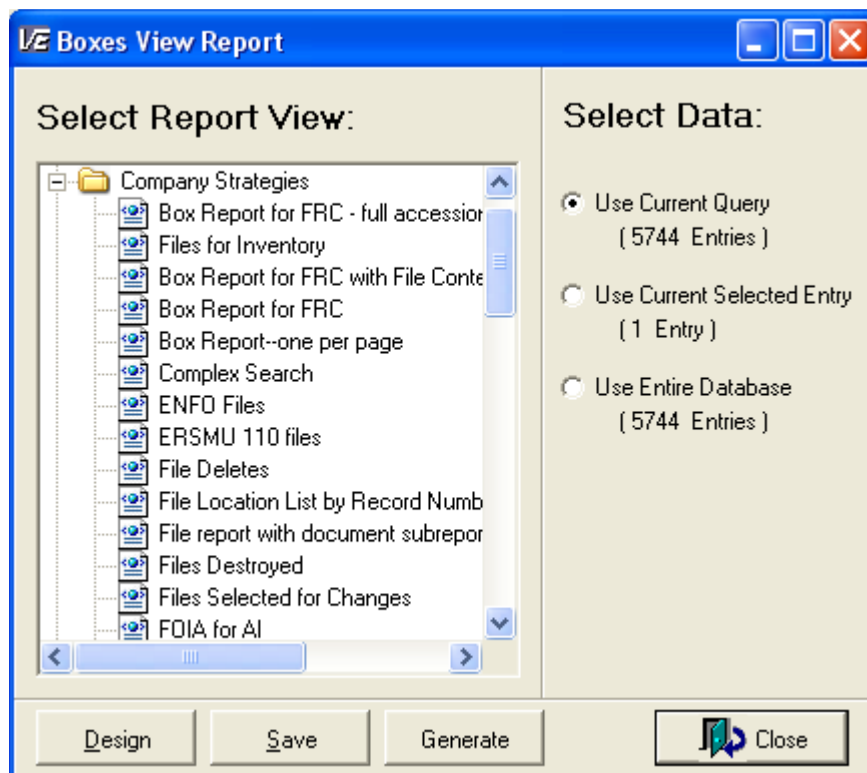
2. The **Browse Boxes** button will give you a list of boxes that match your **Search** criteria (it also serves as a toggle button to go back to the **Boxes** screen).



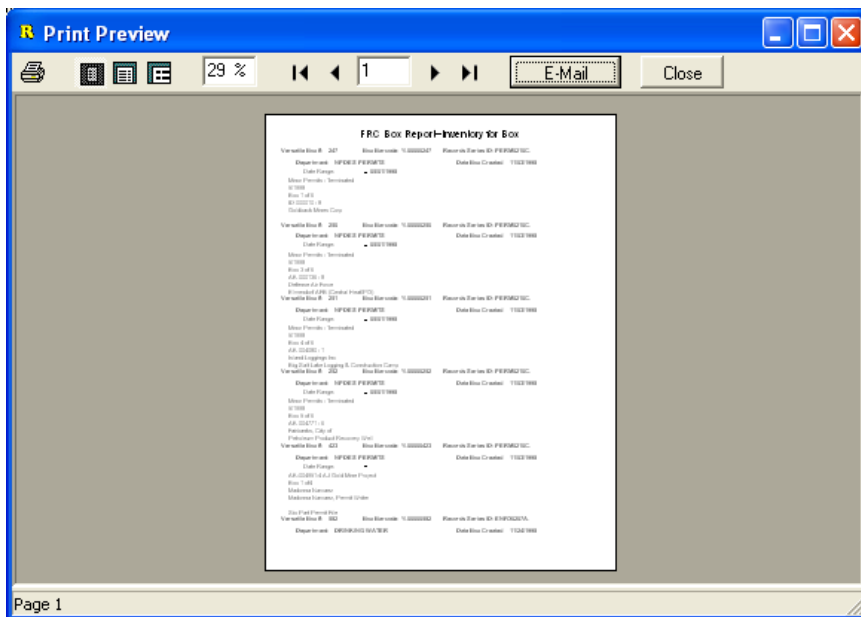
Browse Boxes >

< **Box Reports**

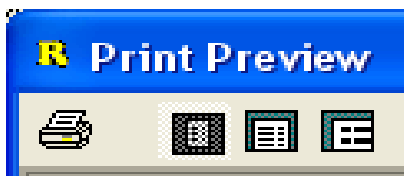
3. After your search is complete, click on the **Box Reports** button. This will bring up the **Boxes View Report** screen.



4. Select Report View (ex **Box Report for FRC**, or **Box Report for FRC with File Contents**)
5. Click **Generate**.



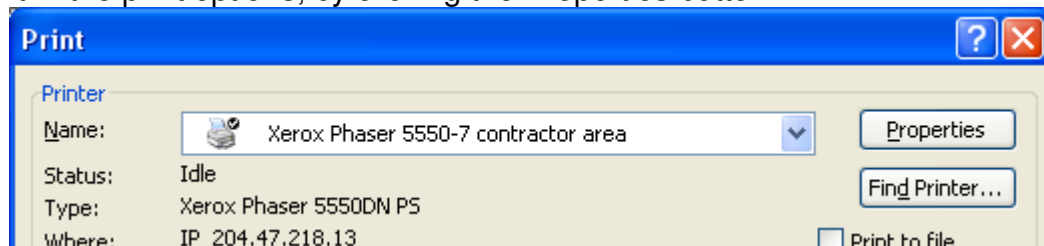
6. That will bring up the **Print Preview** screen (use the magnify buttons).



< **Magnifying buttons:** Whole Page, Page Width & 100%

7. Click on the **Print** icon.

Note: If you want your report to print 2-sided, you'll need to manually change it in the print options, by clicking the Properties button.



8. Attach the report to the SF135 form you get back from the contract Regional Records Manager, Joyce.


(Please email the completed SF135 form and the Versatile box #s to Joyce for review. When they're ready to send to the FRC, she'll ask Mike Wells to sign the form and deliver a copy to you.)

Questions?

UPDATING BOX INFORMATION


After the FRC sends us the SF135 with the Accession Number, you'll need to update that information in the **Boxes** screen.

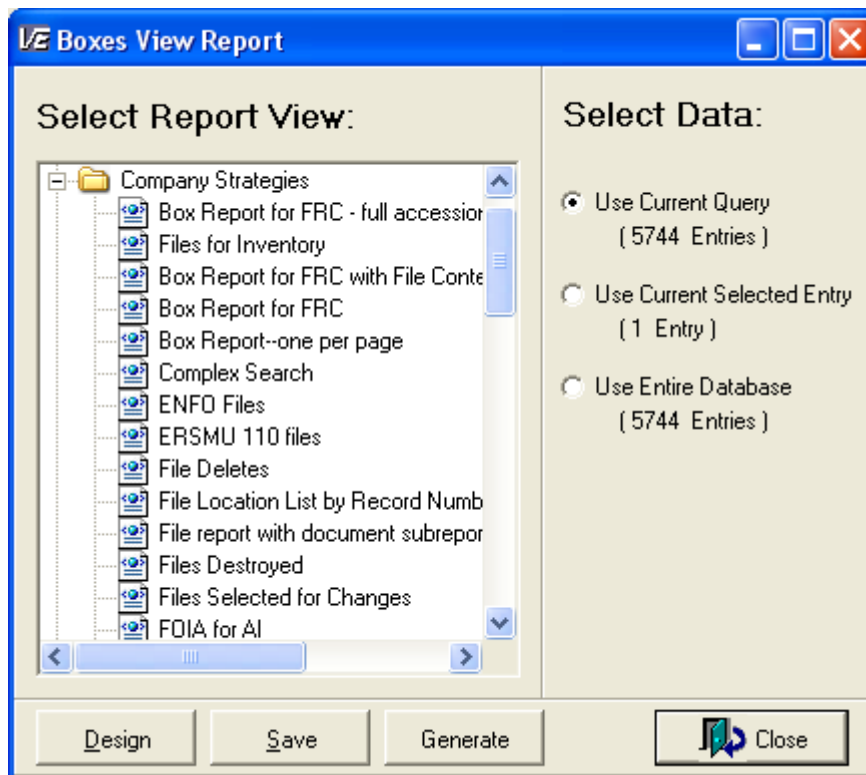
The screenshot shows the 'Boxes' application window. The 'Main' tab is active, displaying several input fields. Under 'Box Identifiers', there are fields for 'Box Number' (1234), 'Accession Number' (412-2013-0123), 'FRC Location' (ARCIS), and 'Barcode ID' (%00005899). Each field has a small icon to its right. The 'Location' section includes 'Box Type' (FRC STANDARD BOX) and 'Record Center' (Federal Records Center). The 'Descriptive Information' section contains 'Company' (U.S. EPA REGION 10 - Production), 'State' (Inactive), 'Department' (/RM/), 'Record Series' (-307A__), and a 'Description' box containing 'Box 1 of 2', 'Date Range: 1/2011 - 12/2011', and 'Records Disposition Files'. On the right side, there is a vertical toolbar with buttons: Search, Update, Delete, Add, Clear, Previous, Next, Itemize Files, Print Label, and Options. At the bottom, there are tabs for General, Additional, Retention, Destruction, Activity, and Ranges.

1. Do a **Search** for on your **Place Holder Accession #** and click the . This will bring up all the boxes for this accession.
2. Replace the last part of your **Place Holder Accession #** with the **4-digit accession number** provided by the FRC.
3. Click **Update**.
(Do not click **Add**, this will create a new box and you'll need to email Joyce to request a box deletion in the Versatile Database)
4. If you're working with a series of boxes, click the **Next** button and it will bring up the next box in the accession to update.
5. Repeat Steps 2 – 4 until all the boxes have been updated.

Questions?

BOX REPORT FOR THE SF135 – FINAL BOX REPORT

1. Do a **Search** on your new accession number and click the .
2. Click the **Box Reports** button and choose the **Box Report for FRC – full accession #**, or **Box Report for FRC with File Contents – full accession #**



3. Click **Generate** and **Print**. (Reminder: select 2-sided printing)
4. Attach the report to the SF135 with the Accession # and place in the **FRONT of Box 1** of the accession.
5. Keep a copy for your records.

Questions?